Unlock the Power of Information Sharing

Tips for using SharePoint Portal Server

An End User Guide for Microsoft SharePoint Portal Server 2003

Using Search

Introduction

SharePoint Portal Server indexes content in the portal site so that users can search for and find Web sites, documents, people, and other content that is useful to them.

1. To begin searching, type a search term in the search box in the upper right corner of the screen. For example, you can type the name of the team or division in which you work to see documents, people, and information related to that team.
2. You can narrow the scope of your search by clicking the content sources list. This provides you with a list of content sources that can be searched. To search all content sources, ensure that **All sources** is selected.
3. When you are ready, click the green arrow to begin the search.

Explore Search Results

1. When you view search results, you have a number of options regarding how these results are listed. For example, you can view your results by site, simple list, author, date, or area by choosing the relevant option in the left column under **Select View**. If **By Site** is not selected, click it now.
2. Your search results are now ordered by site. If you have any sites that contain multiple results, only the top result is shown. In this case, a 'See # more results' link (where # is a number) appears under the top result. Click this link to expand a set of results.
3. You can also hide these additional results by clicking the **Hide # results** link.
4. If you want to add this search to your personal site links, click **Add to My Links** in the **Actions** list.
5. If you want to add a particular search result to your personal site links, click **Add to My Links** beneath that search result.
6. If you want to be alerted when these search results change, click **Alert Me** in the **Actions** list.
7. If you want to be alerted when a particular search item changes, click **Alert Me** beneath that search results item.

Managing My Sites

SharePoint Portal Server allows users to have a personal portal site, or **My Site**, where they can gather and publish information of interest to them.

1. To open your personal site page, click **My Site** in the upper right corner of your portal site's home page.
2. Make sure the public view of your personal site is active by verifying that **Public** is selected in the **Select View** list. This section allows you to toggle between the various views of your personal site and shows which view is currently active. If **Public** is not selected, click it now.

Edit your Profile

SharePoint Portal Server collects important user information in user profiles.

1. Verify that the public view of your personal site is active. In the **Actions** list, click **Edit Profile**.
2. To change personal information that others can see through your profile, use the **Edit My Profile** page. Organizations can include different information in their user profiles, so your profile may not match this example precisely.
3. If you want to provide information about yourself, type text in the **About me** box.
4. If you want to provide a picture of yourself, type the URL of the picture in the **Picture URL** box.
5. If you want to list your home phone number, type it in the **Home phone** box.
6. If you want to list your cellular phone number, type it in the **Cell phone** box.
7. If you want to list your fax number, type it in the **Fax** box.
8. If you want to list an assistant's name, follow these steps:
   a. Click **Select Person** next to the **Assistant** box.
   b. On the **Find by** menu, click either **name of user** or **alias of user**.
   c. Type part or all of the person's name or alias in the **Starts with** box.
   d. Click **Find**.
   e. Select the appropriate person under **Results**, and then click **Add**.
   f. When you finish, click **OK**.
3. When you finish, click **Save and Close**. The changes you made to your profile appear in your public view immediately.

Sharing Documents

SharePoint Portal Server makes it easy to create SharePoint sites and Share Content. SharePoint sites can serve a variety of purposes, such as the team Web site for a particular team or division, or for collaboration on a particular task or project. Sites are typically used for document collaboration and temporary storage.

These steps show you how to create a SharePoint site from within the portal site and how to upload and edit documents from a site.

Create a New Site

1. On your portal site home page, click **Sites**. The Site Directory, a list of the different sites contained in the portal site, appears.
2. In the **Actions** list, click **Create Site**. The New SharePoint Site page appears.
3. In the **Title** box, type your new site's name. It should be a short, descriptive name that makes it easy for others to find your site.
4. In the **Description** box, type a brief description of your site. It should explain who uses the site, and what kind of content people can expect to find there.
5. In the **Web Site Address** section, in the **URL name** section, of the area, type your site's Web address. The name of the Web server where your site will be created is already filled out. Beside that, a drop-down menu lists one or more sub areas for site creation. If there are multiple choices, ask your IT department which one to select.
6. In the **Your E-mail Address** section, type your e-mail address. This designates you as the owner of the site. As such, you may receive administrative information from the IT department and user requests for access to the site in addition to suggestions or questions from site visitors.
7. Click **Create**.

Uploading a document

Document Libraries are available from team sites or portal areas. The steps below assume that you are using a team site.

To upload a document:

1. From the menu bar, go to **Documents and Lists**. Find a document library to use and click on its name.
2. To upload a document from your local computer, click **Upload Document** button. Browse to find the file you want to upload and click **Open**. Click **Save and Close**.

Editing a Document

When you check out a document, other users cannot edit the document or see your changes to the document. If you later decide to check in the document without saving your changes, you can use the **Discard changes and undo check out** option on the **Check In** page. You lose any changes made while you checked out the document. The document reverts to the last checked-in version, and no version history is kept for the unsaved changes.

1. From the menu bar, go to Documents and Lists. Find a document library to use and click on its name.
2. Move the cursor over the document you want to edit. A drop-down box will appear. Click the "down arrow" of the drop-down box and select Edit in … To edit directly in SharePoint.
3. The document will open in the appropriate application; go to File, **Check Out**. This will check the document out to you and no other author will be able to modify the document.
4. Once you have completed editing the document, click **Save**, and the go to file a click 'check in', select **Check in**.

Creating Meeting Workspaces

A Meeting Workspace site is a Web site for centralizing all the information and materials for one or more meetings.

Creating a Meeting Workspace

To create a new meeting workspace follows the instructions below:

1. Go to the Web site where you want to add the workspace site.
2. On the top link bar, click Create.
3. Under Web Pages, click Sites and Workspaces.
4. Complete the information about the workspace site you want to create, and then click Create.
5. Select the Meeting Workspace template you want to use, and then click OK.

Creating a Agenda

The Agenda list provides an outline of the meeting so that attendees know what to prepare for in time for the meeting. You can have a plan to follow during the meeting, and everyone can meet the objectives. The list identifies the subjects that need to be covered, the people who will lead the discussion on each subject, and the meeting time that is allotted for each area.

1. On the **Modify This Workspace** menu, click **Add Web Parts**.
2. Do one of the following:
   a. Create the list automatically using default settings
      i. Under Web Parts, drag the **Agenda** Web Part to a zone on the page.
   b. Create the list using settings you specify
   c. At the bottom of the task pane, click **Show All Lists**.
   d. Click **Agenda**, specify the information about the list, and then click **Create**.
3. To add content, click **Add item** in the Web Part.
4. Type the subject of the item, and then complete the other fields as you want.
5. On the main toolbar, click **Save and Close**.

Creating a Decision List

Create a Decisions list in a Meeting Workspace site

1. On the **Modify This Workspace** menu, click **Add Web Parts**.
2. Do one of the following:
   a. Create the list automatically using default settings
      i. Under **Web Parts**, drag the **Decisions** Web Part to a zone on the page.
   b. Create the list using settings you specify
      i. At the bottom of the task pane, click **Show All Lists**.
      ii. Click **Decisions**, specify the information about the list, and then click **Create**.
   c. To add content, click **Add item** in the **Web Part**.
   d. In the **Decision** box, type the text you want to appear. Complete the other fields as you want.
   e. On the main toolbar, click **Save and Close**.

Notes: You must be a member of the *Web Designer* or *Administrator* site group to do this procedure.

If the *Meeting Workspace* site has more than one meeting, you can change the list to share its content across all meetings in the workspace site.

Using Team Site Collaboration Tools

Surveys provide a way of polling team members. If your site includes a survey, you can go to it by clicking Documents and Lists in the top link bar and then clicking the survey in the Surveys section.

Create a New Survey

In this example, you create a new survey.

1. Create a survey
2. In the top link bar, click **Create**.
3. On the Create Page page, click **Survey**.
4. In the **Name** box, type a name for the survey.
   a. This field is required.
5. In the **Description** box, type a description of the purpose of the survey.
   a. This field is optional.
6. In the **Navigation** section, if you want a hyperlink to this survey to appear on the Quick Launch bar, click **Yes**.
7. In the **Survey Options** section, if you want respondents' names to be visible when a team member views the survey results, click **Yes** under **Show user names in survey results?**.
8. If you want to allow team members to respond more than once to the survey, click **Yes** under **Allow multiple responses?**.
9. Click **Next**.
10. On the **Add Question** page, in the **Question box**, type a question.
11. Select an option for the type of answer that you want.
12. For example, if you want team members to choose from a set of items, click **Choice**.
13. If you want to add more questions, click **Next Question** and repeat the steps above.
14. When you are done adding questions, click **Finish**.

Respond to a Survey

1. Respond to a survey
2. On the top link bar, click Documents and Lists.
3. In the Surveys section, click the name of the survey.
4. At the top of the survey, click Respond to this survey.
5. Answer the survey questions by filling out the form.
6. Click Save and Close.

Create a New Discussion Board

Discussion boards provide a forum for conversing about topics that interest your team. For example, you could create a discussion board for team members to suggest activities.

In this example, you create a new discussion board.

1. In the top link bar, click **Create**.
2. On the Create Page page, click **Discussion Board**.
3. In the **Name** box, type a name for the discussion board.
   a. This field is required.
4. In the **Description** box, type a description of the purpose of the discussion board.
   a. This field is optional.
5. In the **Navigation** section, if you want a hyperlink to this discussion board to appear on the **Quick Launch** bar, click Yes.
6. Click Create.
7. You can open the new discussion board by clicking **Documents and Lists** on the top link bar and then clicking the discussion board name in the **Discussion Boards** section. If you chose to add the discussion board to the Quick Launch bar, you can also click the discussion board name there to open it.

Participate in a Discussion

1. On the top link bar, click **Documents and Lists**.
2. In the **Discussion Boards** section, click the name of the board in which you want to participate.
3. Do one of the following:
   a. Start a new discussion
      i. Click **New Discussion**.
         1. In the **Subject** box, type a title for your comment.This field is reqired.
         2. In the **Text** box, type your comment.
         3. Click **Save and Close**.
   b. Reply to an existing comment
      i. In the **Subject** column, point to the discussion comment to which you want to reply, click the down arrow on the menu that appears, and then click **Reply**.
      ii. In the **Text** box, type your comment.
      iii. Click **Save and Close**.
   c. Edit your own discussion comment
      i. In the **Subject** column, point to the discussion comment that you want to edit, click the down arrow on the menu that appears, and then click **Edit Item**.
      ii. Modify the comment as desired, and then click **Save and Close**.
   d. Delete a discussion comment
      i. In the **Subject** column, point to the discussion comment that you want to delete, click the down arrow on the menu that appears, and then click **Delet**e Item.
      ii. Click **OK** to confirm that you want to delete the comment.

Note: If the site is a Meeting Workspace site, ignore steps 1 and 2. To start a new discussion, click Add discussions in the General Discussion Web Part. Then follow the remaining steps above.

Adding Alerts and Announcements

Alerts enable you to be notified by e-mail of any changes made to the content of your Web site. You can create alerts for lists and libraries, as well as for individual items and any files in them.

Anouncements list are used to post news, status, and other short bits of information you want to share with team members. Below are steps to create alerts and announcements.

Adding Alerts

You can specify how frequently you want to receive alerts. You can have them appear immediately or as daily or weekly summaries. When you no longer need to follow changes for the list, library, item, or file, you can delete your alerts at any time.

Go to the page that displays the list or library for which you want to add an alert.

1. Under **Actions**, click **Alert me**.
2. In the **Send Alerts To** section, confirm that the destination e-mail address is correct.
3. In the **Change Type** section, specify whether you want to be notified when items have been added, changed, or deleted, or click **All changes** to be notified whenever any type of change occurs.
4. In the **Alert Frequency** section, click the number that reflects how often you want to be notified of changes.
5. Click **OK**.

Creating an Announcements List

1. In the top link bar, click **Create**.
2. On the **Create Page** page, click one of the following for the kind of list that you want to create:
   a. Announcements
3. In the **Name** box, type a name for the list.
   a. This field is required.
4. In the **Description** box, type a description of the purpose of the list.
   a. This field is optional.
5. In the **Navigation** section, if you want a hyperlink to this list to appear on the **Quick Launch** bar, click **Yes**.
6. Click Create.

You can open the new list by clicking **Documents and Lists** on the top link bar and then clicking the list name in the **Lists** section. If you chose to add the list to the **Quick Launch** bar, you can also click the list name there to open it.

Posting Content to the Portal

1. From the menu bar, go to Documents and Lists. Find a document library to use and click on its name.
2. Locate the document that you want to publish.
3. Point to the document, click the arrow, and then click **Submit to Portal Area**.
4. Fill in the appropriate fields and click ok.

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